

agricultural situation

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WHICH WAY PRICES AFTER CROP REPORTS?



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It's a familiar statement: "I don't bother any more to fill out those questionnaires from the Crop Reporting Board. It seems whenever they issue one of those reports, prices go down."

But do they? Look what happened last April after SRS's Crop Reporting Board released its prospective plantings report:

On Thursday, April 15, 1976, December cotton futures closed at 58½ cents a pound. That same day,

after the commodity markets closed, SRS reported that the Nation's cotton growers intended to plant 11.3 million acres of cotton, 16 per cent more than last year, but 18 per cent below the 1974 level.

The commodity markets weren't open on Friday because of the Easter holiday. But when trading resumed on Monday, April 19, December cotton futures closed at 60½ cents a pound. For cotton producers, that meant an additional \$10 a bale.

CORN PRICES FOLLOWING CORN PRODUCTION FORECASTS

Date	1 Day Later		1 Week Later	
	Higher	Lower	Higher	Lower
	<i>Cents per bushel</i>		<i>Cents per bushel</i>	
1973				
Aug.	+15		No change	
Sept.		-12	+1	
Oct.		-15		-3
Nov.	+9		+18	
1974				
Aug.	+34		+25	
Sept.	+8			-11
Oct.	+9		+4	
Nov.		-2		-18
1975				
July	+5		+10	
Aug.	+7			-5
Sept.	+10		+18	
Oct.		-12		-19
Nov.		-5		-3
Number of changes	8	5	6	6

Source: Closing cash prices for Chicago #2 yellow corn as reported by AMS Grain Market News.

That's one time after a crop report that prices turned higher, in the farmer's favor. And it's not an isolated example.

But the point to remember about all SRS crop and livestock estimates is that they are made to help farmers judge the size and value of their production, *not* to drive prices erratically in either direction.

The tables on pages 2-5 show how corn and wheat prices fared over the past 3 years right after SRS released its crop production estimates and quarterly grain stocks reports.

A quick glance at all the tables

reveals that corn and wheat prices headed higher just as often as they turned lower. And in many instances, the "ups" even outnumber the "downs."

Let's look at the first table on page 2 showing how corn prices reacted 1 day and 1 week after SRS released its late summer and fall production estimates.

During 1973, corn prices in Chicago slipped the day following the September and October crop reports. But prices advanced the day after the August and November reports to even the score for that year.

CORN PRICES FOLLOWING GRAIN STOCKS REPORTS

Date	1 Day Later		1 Week Later	
	Higher	Lower	Higher	Lower
	<i>Cents per bushel</i>		<i>Cents per bushel</i>	
1973				
Jan.	+6		No change	
Apr.	+3		+19	
July	+9		+15	
Oct.	+5			-5
1974				
Jan.	+7		+14	
Apr.	+10		+1	
July	+10		+44	
Oct.		-10	+6	
1975				
Jan.		-6		-4
Apr.	+8			-10
July	+3			-2
Oct.		-7		-4
1976				
Jan.		-14		-4
Number of changes	9	4	6	6

Source: Closing cash prices for Chicago #2 yellow corn as reported by AMS Grain Market News.

In 1974, corn prices moved higher the day after three of the four reports issued that year. The following year brought five corn production estimates. The results: corn prices up three times, down two.

Figures at the bottom of the same table give an overview of the 3 years combined. The "Number of changes" line shows, for example, that of 13 corn estimates released during 1973-75, prices the day following the report went up more often than down—by an 8 to 5 margin.

A thread of similarity runs through the remaining tables. In all instances both wheat and corn

prices the day following a crop production or grain stocks report advanced more times than they declined. And in each case, total increases proved greater than total decreases.

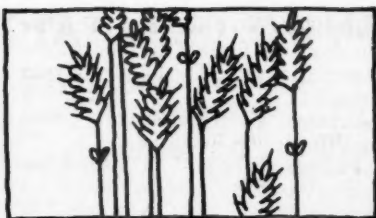
Price changes a full week after the crop reports showed a bit more balance. For example, a week after the crop production and grain stocks reports, corn prices fell back as often as they advanced.

Wheat prices, on the other hand, rose twice as many times as they fell after the production forecasts, but dropped twice as often as they increased a week following the grain stocks reports.

WHEAT PRICES FOLLOWING GRAIN STOCKS REPORTS

Date	1 Day Later		1 Week Later	
	Higher	Lower	Higher	Lower
	<i>Cents per bushel</i>		<i>Cents per bushel</i>	
1973				
Jan.	+2			-4
April.	+3			-16
July	+13		+52	
Oct.		-4		-37
1974				
Jan.	+24		+3	
Apr.	+25			-29
July	+6		+11	
Oct.	+2			-2
1975				
Jan.		-15		-23
Apr.	+2			-2
July	+7		No change	
Oct.		-9	+3	
1976				
Jan.		-19		-2
Number of changes	9	4	4	8

Source: Closing cash prices for Kansas City #1 hard winter wheat (ordinary protein) as reported by AMS Grain Market News.



WHEAT PRICES FOLLOWING WHEAT PRODUCTION FORECASTS

Date	1 Day Later		1 Week Later	
	Higher	Lower	Higher	Lower
	<i>Cents per bushel</i>		<i>Cents per bushel</i>	
1972				
Dec.	+3		+6	
1973				
May	+4		+11	
June	+10			-3
July	+10		+23	
Aug.	+48		+3	
Sept.		-24	+1	
Oct.		-24		-22
Dec.		-10	+6	
1974				
May		-13	+18	
June	+12		+43	
July	+5		+3	
Aug.	+25		+11	
Sept.	+3			-1
Oct.	+5		+5	
Dec.		-7		-10
1975				
May	+1			-1
June		-3	+12	
July	+18		+15	
Aug.	+9		+21	
Sept.	+13		+19	
Oct.		-1		-9
Dec.		-3		-10
Number of changes	14	8	15	7

Source: Closing cash prices for Kansas City #1 hard winter wheat (ordinary protein) as reported by AMS Grain Market News.

AN EYE ON POTATO ESTIMATES

Heavy speculative trading in the commodity market eventually switches the light of attention in the direction of SRS estimates. What influence did the production and stocks reports have on the upsurge in buying and selling activity?

The recent upheaval in Maine potato futures focused interest on SRS estimates of the Maine and U.S. 1975 fall crops.

The first U.S. yield and production forecasts of that seasonal variety, which accounts for 85 percent of all potatoes raised in the country, was made last October. It indicated a crop of 26.66 billion pounds, only 2 percent less than the actual harvest estimate in December of 27.19 billion pounds. The 1975 U.S. crop fell 6 percent below the record setting 1974 mark of 28.87 billion, but still was 7 percent above 1973's 25.39 billion pounds.

The estimate of 122,000 acres for harvest in Maine announced in August held steady through the final January report. The October yield and production forecast, first of the season, also remained unchanged through the final harvest estimate in December of 22,000 pounds per acre, 2.68 billion pounds in all.

The Maine crop was 26 percent smaller than the record 1974 effort of 3.64 billion pounds and 7 percent short of the 2.88 billion in 1973.

SRS is not a recent arrival in the potato estimating business. They published their first annual Irish potato output figures in 1841 and started acreage and production reports in 1862. The monthly program of production estimates was launched in 1912 and potato stocks reports were added in 1924.

Certainly, longevity alone does not guarantee reliability in estimating production and supplies for individual States and the Nation.

SRS evaluates and adjusts its

estimating procedures periodically to make sure the reports adequately aid producers coping with output and marketing decisions.

Reports start with estimates of farmers' planting intentions, which are made in April for the all-important fall crop. The first view of acreage for harvest is published in August followed by reports October through January with yield and production data for 25 States.

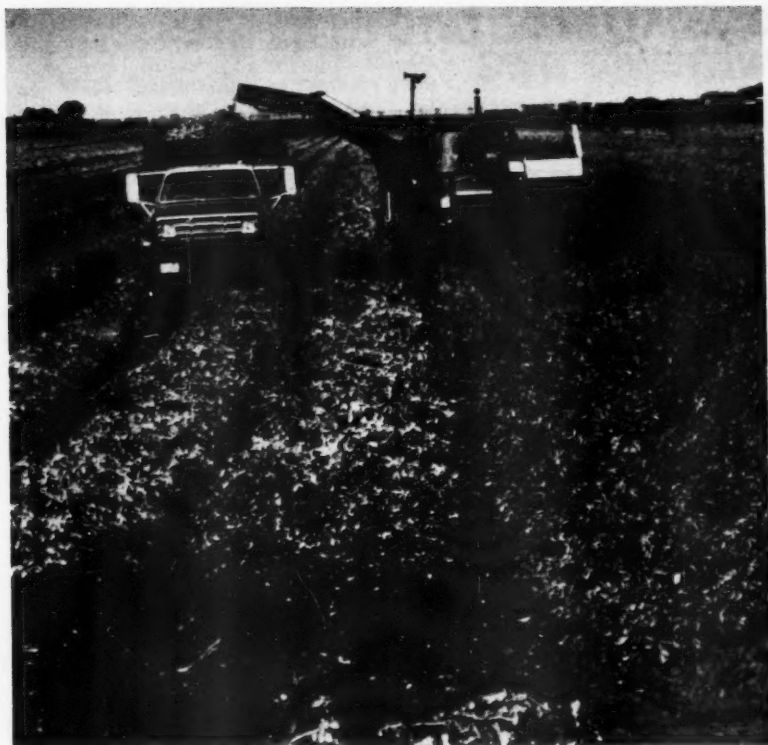
Much of the information for the acreage estimate for other than fall crops is gathered in mail surveys of producers. However, in the 12 States which account for about 95 percent of the fall crop, a sophisticated probability survey is conducted. Growers with large acreages are more likely to be selected than producers with few acres. All producers with 200-600 acres or more, depending on the State, are contacted. And all growers selected in the sample who don't respond by mail are telephoned or interviewed in person.

SRS also conducts special in-the-field work in the 12 States to help determine yields.

In each of these 2,100 randomly selected fields, SRS representatives impartially select and measure two 20-foot rows of potatoes. All the potato hills in the two rows are counted and then potatoes from three hills in each row are dug for weighing, sizing, and grading. The distance between the rows, along with the number of hills per row, provides data on plant population, which is coupled with the average weight of the potatoes to indicate the gross yield per acre.

After the farmer harvests the crop, a small area in the field is revisited and all the potatoes missed in harvesting are picked up and weighed to indicate harvesting loss.

Most of the fall crop is stored for sale from October through June.



SRS estimates stocks held by local dealers and growers December through April and the movement of potatoes to processors in key States to help producers, processors, and dealers judge supplies on hand and disappearance for specified times.

The stocks estimating program, as technically modern as that for production estimates, is based on contacts with holders of both on- and off-farm storage facilities.

In a typical State, all large storage facilities are included in the monthly stocks survey, while generally one of every two medium-sized operations, and roughly one of four small operations are included.

Results from this probability survey of potatoes in storage are also compared with additional information gathered in many

States on potatoes used by processors, fresh-market shipments, and other related information.

Changes in stock estimates from month to month reflect potatoes sold for all purposes, eaten or fed on producing farms, and lost through shrinkage and decay, or discarded.

The December 1975 stocks report indicated 2.08 billion pounds of Maine potatoes and 17.9 billion, nationally. By April, the Maine stocks were down to 740 million pounds against the 1.3 billion a year earlier. The U.S. stocks had dwindled to 6.7 billion, compared with 7.6 billion in April 1975.

SRS is also conducting special survey work in the Red River Valley of North Dakota and Minnesota to estimate the change in quality of potatoes in storage.

SAVING SOIL WITH WILLOWS

Willows may one day wave gracefully over what are now erosion-devastated streambanks.

Currently, the trees serve as the focal point of a long-term study launched in June 1974 by USDA's Agricultural Research Service and Soil Conservation Service, in which scientists will evaluate the effectiveness of three species of willows in stabilizing eroded streambanks.

Researchers estimate there are about 150,000 miles of badly eroded streambanks in the United States today. This erosion causes a host of problems, among them the loss of valuable soil, flooding, and the silting of lakes, reservoirs, and river and stream channels.

Site of the present study is Pigeon Roost Creek in northwestern Mississippi, a stream with erosion-marred banks typical of those around the country. Roughly 117 square miles of drainage area lie above the location.

Willows were picked for the study because they appear to have what it takes both to survive along a stream and control erosion: They must be able to grow in the wet soil at the water's edge as well as in dry land further up the slope. They should also stand firm and literally "hold their ground" against powerful assaults of rushing water.

Willow cuttings 8 to 10 inches long are being planted on both sides of a total of 1,500 feet of streambank in three locations along Pigeon Roost Creek. The willows will be fertilized to hasten growth and establishment.

Throughout the study, scientists will continually record soil loss, water velocity, willow survival, and other variables, and document the experiment's progress with photographs.

Besides observing how well the

willows retain soil along the streambank, researchers will also be on the lookout for any potential problems created by the trees, such as spreading into stream channels or adjacent farmland. If that happens, scientists will then determine how to manage the willows.

WHAT'S NEW IN NAVAL STORES

Say naval stores and many people think of something to do with maritime vessels. They're right, but that's just part of the story.

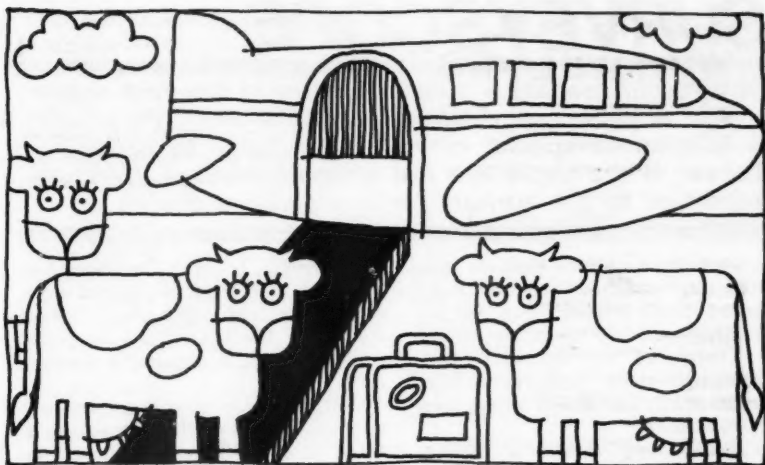
Naval stores, a group of pine tree extracts, got their name back in the days when they were used almost exclusively to repair and maintain our wooden sailing ships. Today naval stores turn up in a surprising range of products, including soaps, varnishes, and medicines.

SRS has published a monthly report on the output and stocks of naval stores for more than 30 years, and each spring releases an annual summary on all aspects of production and use.

In its annual summary spanning April 1975 to March 1976, SRS reported that U.S. turpentine production hit its lowest level in two decades. Total output, at roughly 448,000 50-gallon barrels, was off 8 percent from a year earlier. Unusually large inventories, fueled by increased imports, discouraged domestic production in 1975-76.

Sulphate turpentine cornered 86 percent of total production, though output dropped about 6 percent. Output of steam distilled turpentine skidded about a third. And while processors turned out a third more gum turpentine, this variety snagged only 5 percent of the total output.

In line with the production draw-down, turpentine consumption dipped one-fifth below 1974-75 usage.



BOSSY GOES ABROAD IN BIG WAY

U.S. exporters of dairy cattle will have to scramble if they hope to top last year's successes.

During calendar year 1975, the number and value of animals shipped, as well as the number of importing countries, all reached record highs.

USDA issued health certificates for roughly 73,000 dairy breeding cattle for export last year, compared with about 58,000 in 1974. Valued at an estimated \$58 million, the animals traveled to 57 countries in 1975, 3 more than a year earlier.

North American countries proved the biggest customer when, paced by Mexico and Canada, shipments shot up 65 percent to over 50,500 head. But North America's share of total U.S. dairy exports slipped from 75 to 69 percent.

The Middle East picked up some of the slack, with purchases vaulting 553 percent last year to nearly 10,000 head. Inspectors okayed 9,200 dairy cattle for transport to Iran, but actual shipments may have run slightly less. In some cases, health

certificates expired due to delays in air shipments.

Shipments to South America climbed more than 150 percent to 4,200 animals, while European importers upped their purchases slightly to around 6,300 head.

Meantime, exports to Asian nations skidded by more than half to around 2,000 head, and fewer than 500 animals touched down in Africa, compared with 824 the year before.

In a breakdown of who buys what, Canada came up the No. 1 customer for two of the five breeds exported. All but 6 of the 201 Ayrshires leaving the States came off the ramp in Canada, as well as three-fourths of all the Guernseys shipped. Mexico corralled the most Holsteins, Jerseys, and Brown Swiss.

The most exported breed in 1975? Holsteins, with a record 67,000 of the 73,000 animals shipped. Jerseys also chalked up a record sales year, accounting for 1,050 head.

Forty-two States had a hand in last year's shipments. Wisconsin led the country with over 16,300 head, and California placed second with close to 12,700. Exports of 6,000 animals put Minnesota in third place, followed closely by Texas, with 5,400 head.

SURVEYSCOPE

To give our readers a clearer picture of the vast scope of SRS activities, Agricultural Situation presents a series of articles on special surveys undertaken in various States. While these are not national surveys, they are important to the agriculture in individual States.

"Michigan blueberry growers have long claimed they produce more berries than anyone else in the country," says C.A. Hines, Statistician in Charge of the Michigan Crop Reporting Service. "Now, results from our State's first blueberry survey back up that claim.

"Last year," reports Hines, "Michigan produced an estimated 32.1 million pounds of blueberries, 40 percent more than New Jersey, its closest competitor, and well beyond the output of its next biggest rival, North Carolina."

The blueberry survey began late last

year when industry leaders and growers, realizing they needed more information than was available, called upon the Michigan Crop Reporting Service to pull together the missing data.

With the help of various industry contacts, Hines's office developed a list of about 1,200 possible blueberry growers located throughout the State. In December 1975, the Michigan Crop Reporting Service mailed an initial questionnaire to each person on the list.

Reminders went out a couple of weeks later to encourage response.



Mechanized harvesters sweep through blueberry fields in Michigan, where this year . . .

Enumerators then either telephoned or personally interviewed all those who failed to respond to either request.

Of the 1,200 people thought to be growers at the start of the survey, only about 580 actually operated on a commercial scale. Farm reporting less than half an acre in production were not included in the survey totals, as they have a minimal impact on Michigan's blueberry industry.

Completed questionnaires from commercial growers yielded acreage data by age and variety, production, crop use, and harvesting methods. The final tally showed Michigan producers had roughly 9,700 acres planted in blueberries in 1975. More than 8,500 acres contained bushes of bearing age—at least 5 years old.

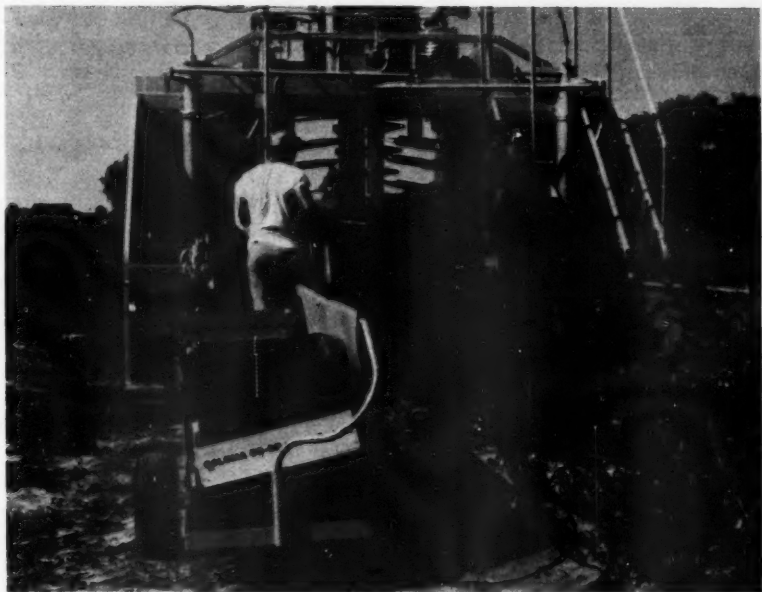
Three major blueberry varieties dominated. Jersey, the overwhelming leader, accounted for 56 percent of all acreage planted. Bluecrop and Rubel followed with 14 percent each. The remaining acreage

was divided among at least 25 other varieties.

The bulk of Michigan's blueberry crop is harvested along the shores of Lake Michigan, where the berries thrive in the moist, acidic soil. Five southwestern counties bordering the lake produced 93 percent of the 1975 commercial scale. Farms reporting less from 25 counties.

Roughly 65 percent of last year's crop went for processing; the remainder went for fresh use. Producers sold around 91 percent of the harvest to commercial firms and the remaining 9 percent through roadside stands, pick-your-own operations, and other local outlets.

"Hopefully, this survey will become an annual project," states Hines. "We've developed a good, basic set of data about Michigan's blueberry industry. Yearly updates on these figures could provide valuable information that would help the industry evaluate and adjust to changing market conditions."



... the State's first blueberry survey proved Michigan ranks as the Nation's top producer.

Briefings

RECENT REPORTS BY USDA OF ECONOMIC, MARKETING, AND RESEARCH DEVELOPMENTS AFFECTING FARMERS.

WEATHER WAS A FACTOR . . . In early April, SRS's Crop Reporting Board found 4,247,900 workers on U.S. farms—up 8% from a year earlier. Farm operators plus unpaid family members working 15 hours or more during the April 11-17 survey week totaled 3,050,200 for a gain of 4%. The number of hired workers, at 1,197,700, stood 17% above April 1975. Labor watchers pinned the sizable increase on excellent weather conditions which proved ideal for field work in most States.

LONGER HOURS, BETTER WAGES . . . From April 11 to April 17, farm operators averaged 36.8 hours of work, compared with 34.4 hours the previous April. The 33.9 hours worked by unpaid family members turned out the same as last year, but hired workers put in 37.2 hours, roughly an hour and 20 minutes more than a year earlier. For their efforts, the workers earned an average of \$2.66 an hour, up 24 cents from the April 1975 survey.

WE'VE GOT RAISINS . . . The world was richer in raisins following the 1975 crop year, when output shot up 12% from a year earlier. Total world production penciled out to 594,000 metric tons, with the U.S.—the world's biggest producer—supplying 259,100 tons. The U.S. raisin crop topped the 1974 mark by 19%, while the rest of the world watched their output climb by 7% to 335,000 metric tons.

WORK WITH WHEAT . . . Bigger wheat yields form the target of a joint research effort by the Institute of Food and Agricultural Sciences of the University of Florida and USDA's Agricultural Research Service. During the 2-year project, scientists will study fungicides and chemical compounds called growth regulators which can increase wheat yields. Early aging and disease have drastically cut yields, especially in the lower southeastern part of the country. The scientists will develop methods to screen growth regulators and fungicides. After determining how the most active compounds work to increase yields, researchers will then seek to improve their effectiveness.

MOVING AGAINST THE MOTH . . . Man may have won another battle in the war against the gypsy moth with a new insecticide that became available early this summer. According to USDA, the pesticide, Dimilin, has been registered by the Environmental Protection Agency for use against the gypsy moth, which now infests 11 northeast States. The pesticide attacks gypsy moths in the caterpillar stage, causing premature death by interfering with the production of a substance that forms part of the insect's outer layer, or shell. Test data required for EPA registration of Dimilin was gathered last year through USDA's combined forest pest research and development program, which has pooled the resources of four USDA agencies and various universities in an all-out effort to wipe out the gypsy moth and two other forest pests—the Douglas fir tussock moth and southern pine beetle.

TIPS FOR CO-OPS . . . Individuals or groups wanting to form a cooperative will no doubt have a lot of questions that need answering. For people who advise these groups, USDA's Farmer Cooperative Service and Extension Service have pulled together a publication filled with background information and references. The publication describes cooperative organizations and their bulletins, books, visuals, and periodicals that tell about developing, organizing, financing, and operating cooperatives. Also included is a list of firms serving cooperatives and their addresses. For a free copy of Program Aid 1147, "Advising People About Cooperatives," write the Farmer Cooperative Service, U.S. Department of Agriculture, Washington, D.C. 20250.

A BRIEF LAPSE . . . The Soviet Union's 6-year streak of record cotton production was broken in 1975/76 as the country's crop dropped 6.5% from the year-earlier record. Output next season, however, may rebound enough to equal or exceed 1974/75's all-time high of roughly 13 million bales.

TROUBLESHOOTING . . . During the first quarter of 1976, chemical residue violations in meat and poultry dropped slightly below last year's average quarterly rate, according to USDA's Animal and Plant Health Inspection Service (APHIS). Chemical residues in meat products are considered violations when they creep higher than established tolerances or guidelines. Inspectors analysed some 5,400 samples and came up with a violation rate of 2.13%, compared with a 2.2% quarterly average during 1975. APHIS officials reported that violations of diethylstilbestrol (DES), a growth stimulant used in the cattle industry, remained on the downside as well. Of 472 samples tested for DES, inspectors found only one violation.

RADIOACTIVE EROSION . . . USDA scientists cooperating with the Waverly-Shell Rock Community Schools in Waverly, Iowa, will measure cesium-137, a radioactive substance in soil, water, and sediment samples. USDA's Agricultural Research Service (ARS) reports that cesium-137 is useful for studying erosion and sediment because the movement of sediment can be traced by monitoring the radioactive material.

DAIRY DIETS . . . During 1975, American consumers put away the equivalent of 546 pounds of milk per person. This year, say USDA economists, milk use per person could slip slightly, as total milk consumption is seen about the same as a year earlier. Meantime, per capita cheese use could wedge considerably higher after last year's decline. Butter use, meantime, will probably skid along with ice cream, which enjoyed a hefty increase last year.

EC PRICE HIKE . . . Stepped-up grain prices adopted by the European Community early last March for the 1976/77 season represent the biggest increase, both in percent and absolute terms, in EC history. It also marks the Community's third big grain price boost in as many seasons. The price hike will mean higher variable levies on imported grains, as well as heftier subsidies on EC grain exports. It will also lead to expanded European production, due to improved producer incentives, discouragement of overall grain consumption for feed, and decreased demand for grain imports, especially feed grains, from the U.S. and other exporting nations.

ON THE AFRICAN MARKET . . . Calendar year 1975 saw U.S. farm exports to Africa climb to a record \$1.16 billion. That's slightly above the year-earlier record and nearly double the 1973 mark. Behind the expanded shipments to the Dark Continent were large sales of wheat products mainly to Egypt, but also to Morocco, Algeria, and Nigeria. Commodities shipped under P.L. 480 arrangements amounted to \$165 million, or roughly 14% of total U.S. farm exports to Africa.

SAFE TOMATOES . . . Modern tomato varieties present no greater home canning risk than older varieties, according to USDA's Agricultural Research Service (ARS). Although recent reports have indicated that there may be a threat of botulism poisoning from canning some of the new "low-acid" tomatoes, ARS scientists say that today's tomatoes are similar in acid content to most older varieties. Moreover, they add, the so-called "low-acid" tomatoes are actually not low in acid, but high in sugar—which masks the tart, acid flavor of the tomato.

Statistical Barometer

Item	1974	1975	1976—latest available data	
Farm Food Market Basket:¹				
Retail cost (1967=100)	162	175	175	April
Farm value (1967=100)	178	187	185	April
Farmer's share of retail cost (percent)	43	42	41	April
Farm Income:				
Volume of farm marketings (1967=100)	111	115	90	April
Cash receipts from farm marketings (\$bil.)	93.5	² 90.6	² 90.9	
Realized gross farm income (\$bil.)	101.1	² 99.2	² ³ 100.0	
Production expenses (\$bil.)	72.9	² 75.5	² ³ 78.0	
Realized net farm income (\$bil.)	28.2	² 23.7	² ³ 22.0	
Income and Spending:				
Disposable personal income (\$bil.)	983.6	1,076.7	³ 1,140.7	
Expenditures for food (\$bil.)	166.5	184.4	³ 194.3	
Share of income spent for food (percent)	16.9	17.1	³ 17.0	
Prices:				
Consumer price index, all items (1967=100)	147.7	161.2	168.2	April
Food (1967=100)	161.7	175.4	179.2	April
Farm Employment and Wage Rates:⁴				
Total employment (1967=100)	89	89	92	April
Family labor (1967=100)	86	83	86	April
Hired labor (1967=100)	92	95	108	April
Wage rates (1967=100)	176	190	209	April
Agricultural Trade:				
Agricultural exports (\$bil.)	22	² 22	1.9	April
Agricultural imports (\$bil.)	10	² 9	.9	April

¹Average annual quantities per family and single person households bought by wage and clerical workers, 1960-61, based on Bureau of Labor Statistics figures.

²Preliminary.

³Annual rate, seasonally adjusted, first quarter.

⁴Seasonally adjusted.



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